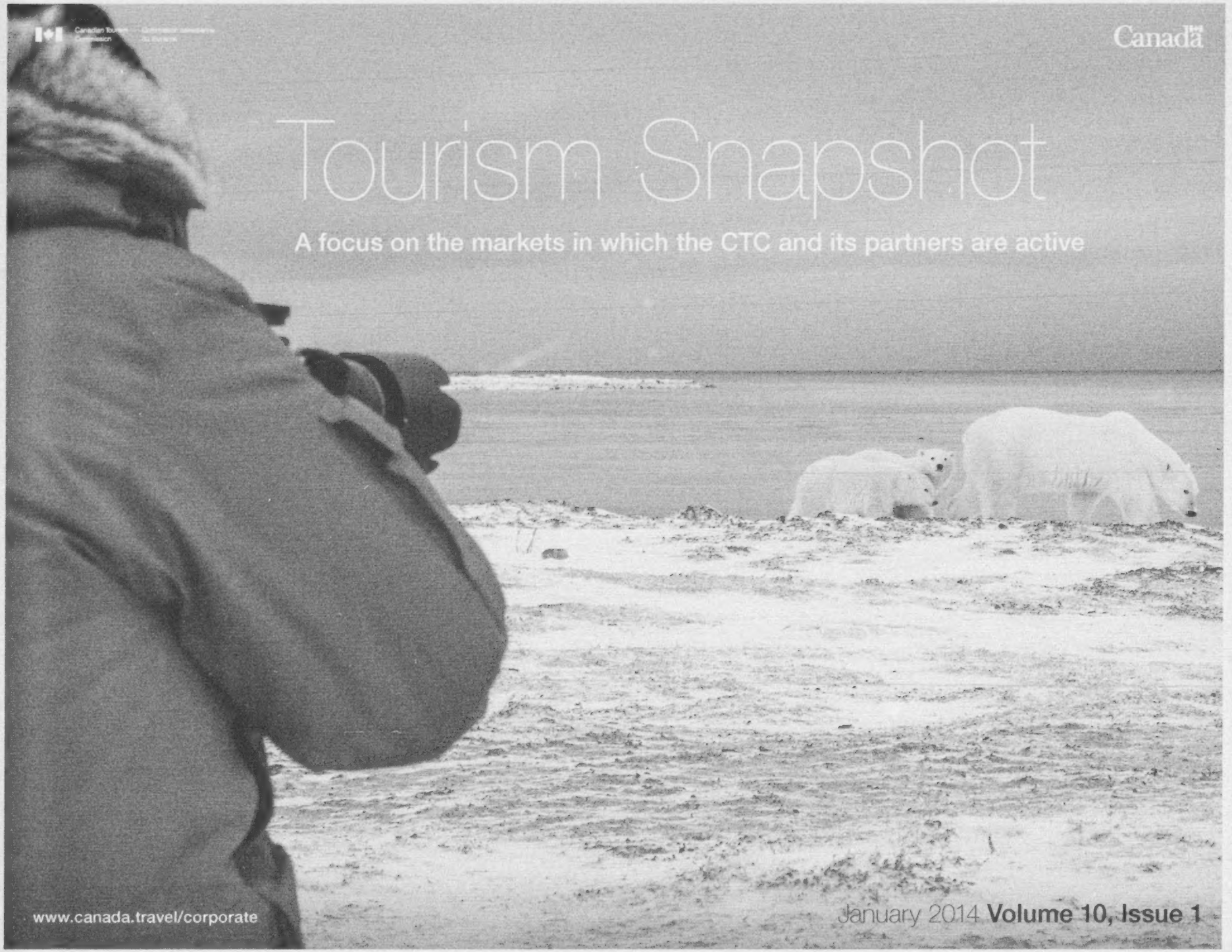
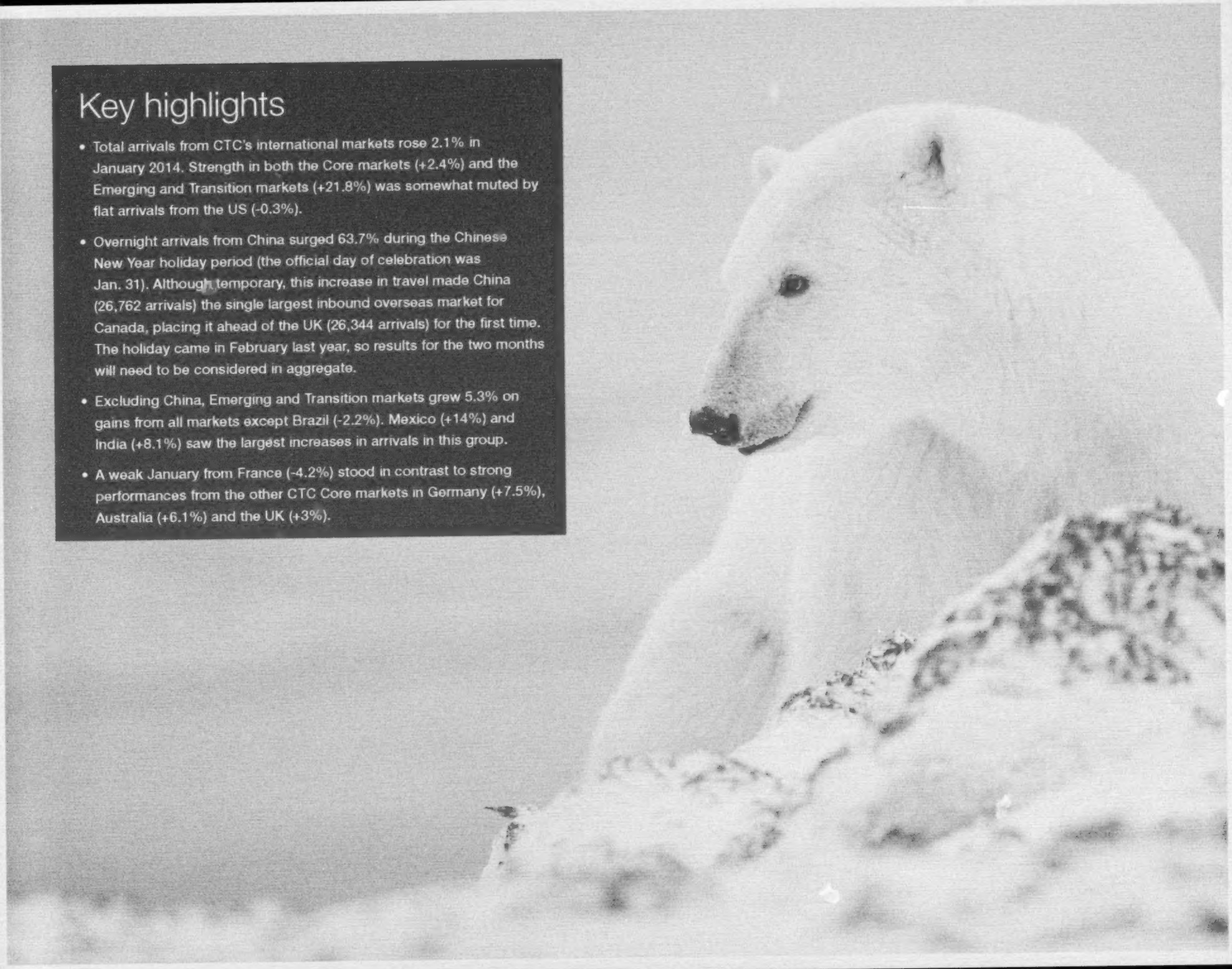

Canada
Tourism Snapshot
A focus on the markets in which the CTC and its partners are active
www.canada.travel/corporate
January 2014 Volume 10, Issue 1

Key highlights

- Total arrivals from CTC's international markets rose 2.1% in January 2014. Strength in both the Core markets (+2.4%) and the Emerging and Transition markets (+21.8%) was somewhat muted by flat arrivals from the US (-0.3%).
- Overnight arrivals from China surged 63.7% during the Chinese New Year holiday period (the official day of celebration was Jan. 31). Although temporary, this increase in travel made China (26,762 arrivals) the single largest inbound overseas market for Canada, placing it ahead of the UK (26,344 arrivals) for the first time. The holiday came in February last year, so results for the two months will need to be considered in aggregate.
- Excluding China, Emerging and Transition markets grew 5.3% on gains from all markets except Brazil (-2.2%). Mexico (+14%) and India (+8.1%) saw the largest increases in arrivals in this group.
- A weak January from France (-4.2%) stood in contrast to strong performances from the other CTC Core markets in Germany (+7.5%), Australia (+6.1%) and the UK (+3%).



Tourism review Inbound highlights

Overnight trips to Canada

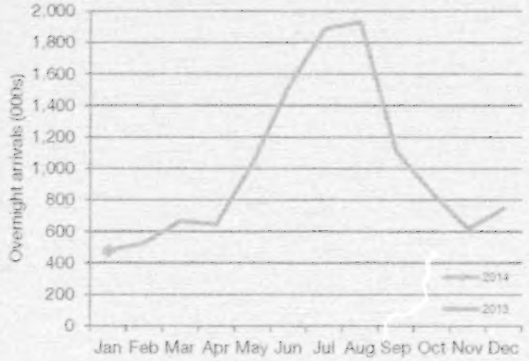
	Jan. 2014	14/13 Jan. % Change
United States		
Automobile	256,936	0.4
Plane	187,757	1.4
Other	31,591	-14.0
US Total	**476,284**	**-0.3%**
Core Markets		
UK	26,344	3.0
France	18,854	-4.2
Germany	10,907	7.5
Australia	18,167	6.1
Core Total	**74,272**	**2.4%**
Emerging/Transition Markets		
Japan	10,094	4.7
South Korea	9,778	3.5
Mexico	9,171	14.0
Brazil	8,217	-2.2
China	26,762	63.7
India	6,702	8.1
Emerging/Transition Markets Total	**70,724**	**21.8%**
CTC Overseas Key Markets	**144,996**	**11.0%**
Other Overseas Countries	84,756	11.4%
Total Non-US Countries	229,752	11.2%
Total Countries	**706,036**	**3.1%**

Note: Statistics Canada preliminary estimates
Source: Statistics Canada, International Travel Survey

International trips

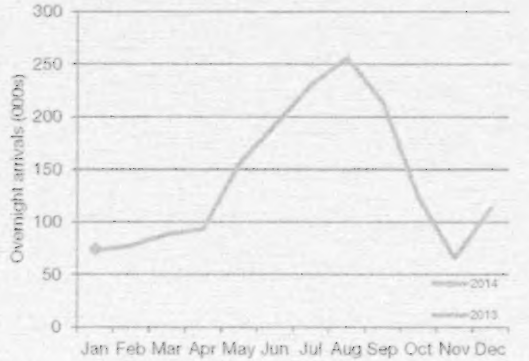
- Canada welcomed approximately 700,000 international visitors in January, an increase of 3.1% compared with the same month in 2013.
- Overnight arrivals from Germany (+7.5%), Australia (+6.1%) and the UK (+3%) rose in January, while those from France declined (-4.2%). Total arrivals from CTC's Core markets numbered 74,272, up 2.4% over January 2013.
- Total arrivals from CTC's Emerging and Transition markets (Japan, South Korea, Mexico, Brazil, China and India) rose 21.8% in January to 70,724. Arrivals from Mexico (+14%) and India (+8.1%) expanded strongly, but it was a surge in arrivals from China (+63.7%) during the Chinese New Year holiday period that dominated the results.

United States



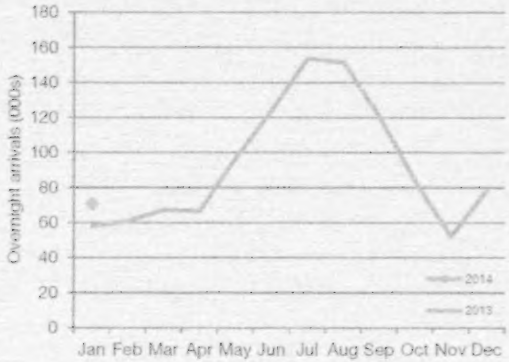
- Overnight visitation from the US edged down 0.3% in January to 476,284. Auto (+0.4%) and air (+1.4%) arrivals increased modestly, while the number of travellers arriving by other means declined 14%.
- In January, only the provinces of Quebec (+4.7%), British Columbia (+9.4%) and Yukon (+8%) saw gains in the number of overnight US border-crossing arrivals.

Core Markets



- Contrary to the decline seen in France (-4.2%), arrivals from Germany (+7.5%) and the UK (+3%) surged ahead in January. German arrivals to Ontario (+17.5%) were particularly strong.
- In January 2014, arrivals from Australia increased 6.1% to 18,167, with most of the gains going to Alberta (+16.5%) and British Columbia (+7%).

Emerging Markets

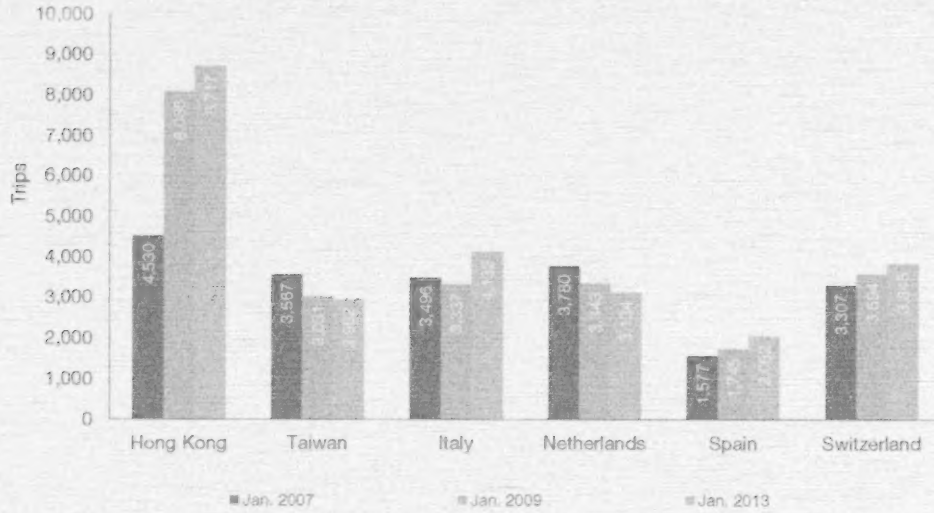


- Overnight arrivals from China surged 63.7% during the busy Chinese New Year travel period at the end of January, leading the Emerging and Transition markets to a 21.8% gain overall. The holiday fell on January 31 this year, compared with February 10 in 2013, so the two months will need to be considered in aggregate in order to determine year-over-year organic growth.
- The temporary bump in travel made China (26,762 arrivals) the single largest inbound overseas market for Canada in January, placing it ahead of the UK (26,344 arrivals) in the monthly rankings for the first time.
- Excluding China, Emerging and Transition markets grew 5.3% on strong performances from Mexico (+14%) and India (+8.1%). Japan (+4.7%) and South Korea (+3.5%) also saw gains, while arrivals from Brazil (-2.2%) declined.

Market Watch

- Arrivals from other selected European markets were generally positive in January 2014: Switzerland (+5%), Spain (+8.1%) and Italy (+9.5%) all moved ahead compared with January 2013, while arrivals from Netherlands (-6.1%) declined.
- In January, arrivals from Hong Kong (+58.4%) and Taiwan (+34.1%) surged ahead in connection with the busy Chinese New Year holiday travel period.

Overnight trips to Canada, by selected markets



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, *International Travel Survey*.

Travel Characteristics Highlights (Q1-2014)

The International Travel Survey is currently going through a modernization initiative. We anticipate that the next release by Statistics Canada will be in the first half of 2014.

Overnight trips to Canada, by selected markets

	Jan. 2014	14/13 Jan. % Change
Italy	4,132	9.5
Netherlands	3,134	-6.1
Spain	2,052	8.1
Switzerland	3,846	5.0
Hong Kong	8,717	58.4
Taiwan	2,962	34.1

Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, *International Travel Survey*.

Competitive review (January - December 2013)**

International Travel (in thousands)

	Trips To:			
	Canada		Australia	
Trips From:		13/12 Change		13/12 Change
Total International	16,589.7	1.5%	6,482.4	5.5%
United States	12,008.0	1.0%	508.7	6.2%
Canada	...	...	119.4	-0.5%
Core Markets				
United Kingdom	645.7	-1.3%	634.1	6.8%
France	459.5	0.9%	103.6	6.1%
Germany	311.4	-0.1%	162.6	5.0%
Australia	264.2	2.4%	...	...
Emerging/Transition Markets				
Japan	224.9	-0.6%	328.9	-7.8%
South Korea	144.6	3.3%	193.0	-1.9%
Mexico	150.9	6.3%	...	...
Brazil	93.8	0.2%	34.2	10.3%
China	352.6	22.3%	715.3	14.2%
India	147.1	0.3%	171.7	7.9%
Total Key Markets	**14,802.5**	**1.4%**	**2,971.5**	**5.7%**

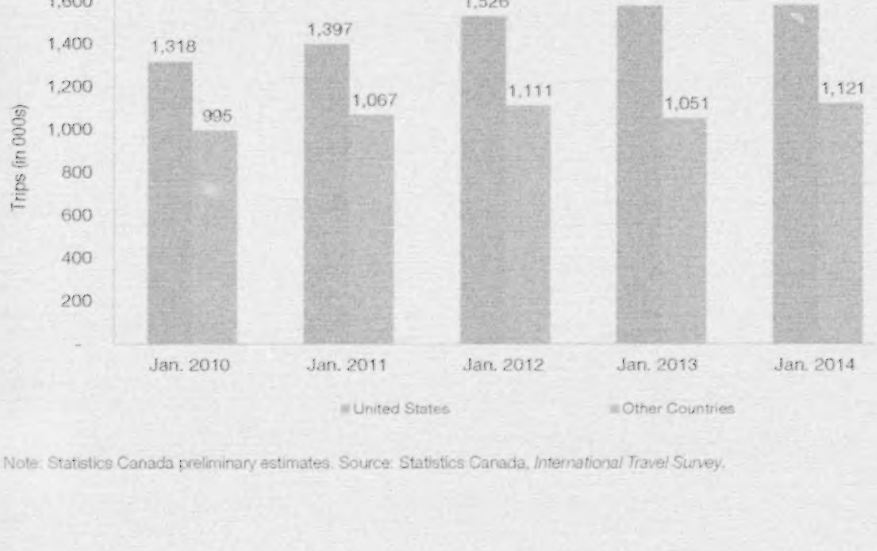
...Not applicable, or data not available.
Note: Statistics Canada preliminary figures.
Sources: Statistics Canada; Tourism Australia.

** US visitation data for December 2013 was not available due to a delay of the change of entry process for US visitors.

- For all of 2013, Australia and Canada saw 5.5% and 1.5% increases in overnight arrivals respectively.
- Both Australia (+14.2%) and Canada (+22.3%) saw large gains in arrivals from China during 2013, making it the top performing market in terms of growth for both countries.
- Arrivals to Canada from both the UK (-1.3%) and Germany (-0.1%) declined, while arrivals to Australia from the UK (+6.8%) and Germany (+5%) increased. Arrivals from France to both Canada (+0.9%) and Australia (+6.1%) rose during 2013.
- In 2013, Australia experienced decreases in overnight arrivals from Japan (-7.8%) and South Korea (-1.9%), while Canada had mixed results, with a decline from Japan (-0.6%) and an increase from South Korea (+3.3%).

Canadian outbound trips

Overnight trips by Canadians



Note: Statistics Canada preliminary estimates. Source: Statistics Canada, *International Travel Survey*.

- In January 2014, Canadian outbound travel increased 2.7% compared with the same month in 2013 to approximately 2.7 million trips.
- The number of Canadians visiting the US during the month of January edged up 0.2% to 1.58 million. Canadian overnight travel to overseas destinations (excluding the US) rose 6.6% to 1.12 million trips.
- In January, most Canadians re-entered the country from the US through Ontario (740,906 entries, +1.3%), British Columbia (327,012 entries, -3.3%) and Quebec (242,783 entries, -0.8%).
- Ontario recorded the largest re-entry of Canadians from overseas countries in January 2014 (506,883 entries, +2%), followed by Quebec (273,936 entries, +8.4%) and British Columbia (170,996 entries, +13.7%).

Overnight trips by Canadians

	Jan. 2014	14/13 Jan. % Change
United States	1,579,194	0.2
Other Countries	1,120,732	6.6
Total Trips from Canada	2,699,926	2.7

Note: Statistics Canada preliminary estimates.
Source: Statistics Canada, *International Travel Survey*.

Consumer outlook

Consumer confidence

- **Canada:** After three consecutive monthly declines, the Index of Consumer Confidence increased by a marginal 1 point in January, leaving the national index at just 81.4 (2002 = 100). Canadians continue to have significant concerns about the country's economic performance.
- **USA:** The Conference Board Consumer Confidence Index®, which had rebounded in December, increased again in January. The Index now stands at 80.7 (1985=100), up from 77.5 in December.

Sources: Consumer Confidence Index, the Conference Board (USA); and Index of Consumer Confidence, the Conference Board of Canada.

Accommodations

Please note that at the time of publication, we were unable to update Canada's Accommodations Table as a result of PKF Consulting Inc.'s "Trends in the Canadian Hotel Industry National Market Report" not being available. The figures for January and February will be published jointly in mid-April 2014.

CTC Market Research & Evaluation